

CITY OF SAN DIEGO
ADMINISTRATIVE REGULATION

SUBJECT	Number 80.00	Issue 1	Page 1 of 8
DEVELOPMENT, SUBMISSION AND REPORTING OF QUARTERLY PERFORMANCE AND PRODUCTIVITY	Effective Date January 6, 1986		

1. PURPOSE

- 1.1 To provide guidelines for the annual development, refinement and submission of department goals, objectives, and output measures. To provide for subsequent comparison of planned versus actual performance. This will be referred to as Quarterly Performance.

To provide guidelines for preparation and submission of Report by those departments having divisions or sections that measure and report relative productivity against a standard (100%). This will be referred to as Quarterly Productivity.

2. DEFINITIONS

- 2.1 The Basis for Quarterly Performance Report is a schedule of objectives and corresponding evaluation criteria submitted at the beginning of each fiscal year.
- 2.2 The Quarterly Performance Report is an evaluation of actual performance submitted quarterly during the fiscal year.
- 2.3 Goals - A goal is a general statement of intended accomplishment for an entire department or major division. It should be viewed as an end state or condition to be attained at some time in the future. The goal should be stated in community-oriented terms, describing intended effects on citizens and the community.
- 2.4 Objectives - An objective is a specific statement describing what is to be achieved, by how much, and within what time frame. For budget planning purposes, the time frame generally should be the ensuing fiscal year.

An objective statement is not merely a description of what a department does, but the result, state, or condition to be achieved. As such, objectives should be results-oriented rather than process-oriented. That is, focus should be on the effects of departmental programs, rather than administrative functions performed. Further, objectives should be stated in terms that permit quantitative measurement of their achievement.

Authorized

(Signed by Sylvester Murray)

CITY MANAGER

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- 2.5 Output measures - An output measure is the criterion established to determine the degree to which a program is successful in meeting its stated objective. That is, output measures should quantify the extent to which desired results are achieved. Corresponding to each objective there should be at least one output measure. Output measures include three different types of indicators:

An effectiveness measure - is an indicator of how well a program objective is achieved. It focuses on citizen-related effects of programs. Examples are percent of stolen cars recovered, accident loss per 100,000 vehicle miles, and average time to respond to a complaint.

An efficiency measure - is an indicator of how economically input (costs or position-years) is converted to output (work load or service units), usually expressed as a ratio of input and output. Examples are cost per investigation, number of books circulated per program dollar, and number of inspections per position-year.

A Work load measure - is an actual account of work units accomplished, indicating level of work activity. Examples are number of acres mowed, number of fires extinguished, and tons of refuse collected.

- 2.6 Measured Positions - are those positions which have been evaluated by the Organization Effectiveness Program staff, and are the subject of periodic reporting systems which are designed to measure relative productivity against a standard (100%).
- 2.7 100% - a measure of productivity defined as the rate of production achieved by qualified workers using normal skills and effort, to accomplish assigned tasks.
- 2.8 Productivity Performance - a measure of the surveyed unit's actual productivity as evidenced by the periodic reporting system, expressed as a percent.
- 2.9 Percent Deviation - the mathematical deviation of actual productivity from 100%, expressed as a percent.

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3. POLICY

- 3.1 Managerial departments will propose meaningful objectives and corresponding output measures. Regular quarterly reports will be required which reflect progress toward objective attainment. Other measures of efficiency and work output are also to be reported where they meaningfully reflect accomplishment of departmental work programs.
- 3.2 In addition, activities that have had implemented productivity measurement systems will provide regular quarterly reports which reflect progress toward the achievement and maintenance of a productivity performance of 100% as defined in 2.7.
- 3.3 Non-managerial departments are invited and encouraged to participate in the reporting system.

4. PROCEDURE

4.1A Development of objectives and output measures (Quarterly Performance)

Responsibility

Action

City Manager's Representative

1. Meet with Department Heads in August of each year and provide guidelines for setting goals, objectives and output measures for the ensuing fiscal year budget submission.

Department Directors

2. During September and with the assistance of the Financial Management Department, refine departmental goals, program objectives and output measures, taking into account past and anticipated program changes.
3. Submit revised goals, program objectives and output measures along with the department's proposed budget for the following fiscal year.

Deputy City Manager

4. The respective Deputy City Manager, together with each Department Director and the Financial Management Director review each department's goals, objectives and output measures simultaneously with the review of each department's budget request for inclusion in the Proposed Budget.

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4.1B Development of Productivity Reporting System (Quarterly Productivity)

Responsibility

Action

Financial Management
Department, Organization
Effectiveness Program (OEP)

1. Will design and initiate a reporting system in connection with the study of the work element.

Department Directors

2. Will assist and advise OEP staff with respect to time standards, allowances, workload variations and other factors as necessary.

4.2 Basis for Quarterly Performance Report

Department Director

1. On or about June 20 each year, proposes changes or new items for the Basis for Quarterly Performance Report to the Financial Management Director for approval. Where possible reporting items should include:
 - a. key objectives stated in the Proposed Budget which are significant in scope and importance.
 - b. evaluation criteria (i.e. output measures) that will serve as a measure for the accomplishment of the identified objectives.
 - c. any other significant work load measures covering those portions of the department work program reflecting the greatest number of work hours or dollar expenditures.

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Responsibility

Action

Department Director

2. Prepares Form CM-3, Basis for Quarterly Performance Report, in triplicate, including changes approved by the Financial Management Director. Program objectives should be stated and appropriate related performance standards (output measures) provided where possible. Work load and efficiency measures should also be provided where appropriate.
3. The "Preliminary Budget" column of Form CM-3 should show the information published in that document (if applicable). For items not published in the budget document, leave this column blank
4. Prepares a definition of all output measures to be included as an attachment to the Basis.
5. Forwards original of Form CM-3 to the appropriate Deputy City Manager and two copies to the Financial Management Director by July 10th.

Financial Management
Director

6. Upon approval of the Basis for Quarterly Management Report, returns one approved copy to the department, and forwards one approved copy to the City Manager's office. Retains one file copy.

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4.3A Quarterly Performance Report

Responsibility

Action

Department/Division Head

1. On a quarterly basis, prepares Form CM-4, Quarterly Performance Report, in quadruplicate. Where data from Auditor's Reports is used to reflect actual levels achieved for that quarter, the Biweekly Reporting period ending prior to the end of the calendar quarter will be considered the cut off date for that calendar quarter. In preparing the report, anticipated current year figures should correspond with the current year program listed on the approved Basis for Quarterly Performance Report. When the actual current year figures deviate from the anticipated by 10% or more, a complete explanation citing the factors causing the deviation must be given in the space provided on Form CM-4. Explanations should be clear and concise, in language suitable for public dissemination (see attached sample).

Department Head

2. Distributes original of Form CM-4 to the appropriate Deputy City Manager and two copies to the Financial Management Director not later than the 17th of the month following the end of the quarter. Retains one file copy. Reports will be reviewed and approved by the department head, or in his/her absence the assistant, before being distributed. Department approval of the report will not be delegated below this level.

Financial Management
Director

3. Reviews the Quarterly Performance Report for any indication of significant operational problems.

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4.3B Quarterly Productivity Report Responsibility

Responsibility

Action

Department/Division Head

1. On a quarterly basis, prepares Form FM-1380 Quarterly Productivity Report, in quadruplicate. The information reported will be cumulative for the quarter. When the quarter's productivity performance deviates plus or minus 10% from 100%, a complete explanation citing factor(s) causing the deviation must be given in the space provided on Form FM-1380. Explanation should be clear and concise, in language suitable for public dissemination (see attached sample).

Department Head

2. Distributes the original to the appropriate Deputy City Manager and two copies to the Financial Management Director not later than the 17th of the month following the end of the quarter. Reports will be reviewed and approved by the department head, or in his/her absence, the Assistant Department Head, before being distributed. Department approval of the report will not be delegated below this level.

Financial Management
Director

3. Reviews the Quarterly Productivity Report, including the adequacy of explanations provided.

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4.4 Quarterly Performance Summary

Responsibility

Action

Financial Management
Director

Submits a Quarterly Management Summary Report to the City Manager not later than 30 after the end of the quarter. Selected data included in departmental Performance and Productivity Reports will be regularly incorporated in this report.

APPENDIX

Subject Index

Quarterly Performance Report
Report
Output Measures
Quarterly Productivity Report
Productivity Measures
Procedures, Productivity Reporting

Forms Involved

Form CM-3, Basis for Quarterly Performance Report
Form CM-4, Quarterly Performance Report
Form FM-1380, Quarterly Productivity Report

BASIS FOR
QUARTERLY PERFORMANCE REPORT

INSTRUCTIONS:

1. Forward original to Deputy City Manager and two copies to Financial Management Director no later than July 10th. Include definitions of items on separate sheet.
2. See Administrative Regulation 80.00.

DEPARTMENT

CITIZENS ASSISTANCE & INFO

DIVISION

CITIZENS ASSISTANCE

FISCAL YEAR

1985 - 86

WORK PROGRAM ITEM OR INDICATOR

ACTUAL COUNT
LAST YEARPRELIMINARY
BUDGETPROPOSED
BASIS

Objective: To respond appropriately to 95% of written/informal complaints received within a specific time frame.

1. Written complaints answered(route slips)
2. Informal complaints/inquiries
(avg. #/day X 252 days = 1 year)
3. City Information Desk inquiries
(avg. #/day X 252 days = 1 year)

6,253	4,200	5,000
15,337	12,000	15,000
105,912	116,000	110,000

Objective: To obtain compliance in 90% of no smoking ordinance complaints.

4. No smoking inquiries

1,070	700	120
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Objective: To carry out special assignments as directed by the City Manager

5. Special Assignments

23	24	24
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*COUNCIL REPORT ITEM

USE ADDITIONAL SHEETS IF MORE THAN 10 ITEMS ARE TO BE REPORTED ON OR TO LIST SPECIAL PROJECTS BEING PERFORMED ON A TIME SCHEDULE. LIST ON ADDITIONAL SHEET ANY EXPLANATION NEEDED TO CLARIFY OR SUPPLEMENT ANY REPORT ITEM.

PROPOSED BASIS CALENDAR
(CUMULATIVE STATISTICS TO DATE)

Quarter Ending	Item	1	2	3	4	5	6	7	8	9	10
September 30		1,500	3,750	2,750	120	6					
December 31		2,500	7,500	5,500	120	12					
March 31		3,500	11,250	8,250	120	18					
June 30		5,000	15,000	11,000	120	24					

SUBMITTED BY:

APPROVED BY:

TITLE

DATE

DATE

EXAMPLE

THE CITY OF SAN DIEGO QUARTERLY PERFORMANCE REPORT		INSTRUCTIONS: 1. Forward original to Deputy City Manager and two copies to Financial Management Director by the 10th of the month following the end of the quarter. 2. See Administrative Regulation 80.00		
DEPARTMENT	DIVISION	QUARTER ENDING		
PARK AND RECREATION	COASTAL	SEPTEMBER 30, 1985		
ITEM	ACTUAL LAST YEAR TO DATE	ACTUAL CURRENT YEAR TO DATE	ANTICIPATED CURRENT YEAR TO DATE	% ACTUAL OF ANTICIPATED **
1. <u>OBJECTIVE</u> : To increase total recreation facility and park use by five percent (5%).				
A. Recreation Ctr. Program Attendance	221,910	417,809	233,000	179.3
B. General Park Use	1,359,000	2,036,625	1,427,000	142.7
2. <u>OBJECTIVE</u> : To reduce preventable vehicle accidents by five percent (5%).				
Preventable Vehicle Accidents	63	29	60	48.3
3. <u>OBJECTIVE</u> : To increase swimming pool attendance by seventeen percent (17%) at Mission Beach Plunge and by five percent (5%) at Clairemont Community Pool				
10. A. Mission Beach Plunge Attendance	59,000	42,431	69,000	61.5
B. Clairemont Community Pool	34,300	49,685	36,000	136.0
* COUNCIL REPORT ITEM				
** WHEN CURRENT YEAR ACTUAL DEVIATES + OR - 10% FROM ANTICIPATED, INDICATE REASON(S) BELOW:				
1. (A and B) - Due to the department-wide standard of attendance record keeping, which includes more frequent daily counts, there has been a significant increase in participant count. The FY1986 Basis for this report will reflect the new attendance recording procedures				
2. A greater awareness on the part of the supervisors and employees regarding defensive driving has resulted in far fewer accidents than was anticipated based on past history.				
3. (A) - Attendance in contractual programs declined considerably with the earlier than projected termination of "Splash Dance." There were problems with the chemical balance of the water which required unplanned closure of the facility during the fiscal year.				
(B) - City Schools, San Diego Swim Association, and general use were all higher than anticipated during this reporting period.				
SIGNATURE (DEPARTMENT HEAD)		DATE		

THE CITY OF SAN DIEGO, CALIFORNIA QUARTERLY PRODUCTIVITY REPORT		DISTRIBUTION: 1. Forward original to Deputy City Manager and two copies to Financial Management Director by the 10th of the month following the end of the quarter. 2. See Administrative Regulation 80.00		
DEPARTMENT GENERAL SERVICES	DIVISION EQUIPMENT	QUARTER ENDING SEPTEMBER 30, 1985		
PROGRAM ELEMENT/SECTION	MEASURED POSITIONS	PRODUCTIVITY PERFORMANCE		PERCENT DEVIATION FROM 100% THIS QUARTER
		LAST QUARTER	THIS QUARTER	
1. Chollas General Repair	17.0	65	75	-25
2. Chollas Industrial	11.0	97	117	+17
3. Chollas Service Station	10.0	98	103	+3
4. Central Repair	9.0	94	99	-1
5. Central Service	6.0	81	111	+11
6. Rose Canyon Repair	12.0	95	95	-5
7. Rose Canyon Service	6.0	81	100	0
8. Chollas Fabrication	22.0	93	97	-3
9. Parts Management	0	100	80	-20
10.				
11.				
WHEN THIS QUARTER'S PRODUCTIVITY PERFORMANCE DEVIATES $\pm 10\%$ FROM 100%, INDICATE FACTOR(S) CAUSING DEVIATION BELOW:				
1. Recommended Attrition not yet fully completed. 2. Reflects extended unjury leave for one mechanic. 5. Experimental increased lubrication program. 9. Unmeasured area, currently one budgeted opening.				
SIGNATURE (DEPARTMENT HEAD)		DATE		